



***Exercise Guide for
PA370
Short Term Disability***

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Log onto BEACON SAP



Scenario

You need to log on to the BEACON SAP training client so that you can complete course exercises.

Instructions

Use the steps below to log on to BEACON SAP in the classroom.

1. Access the BEACON SAP portal web page.
2. At the Welcome screen, enter the User ID and password that is assigned to your classroom PC.
3. Click the Log on button.
4. Click the SAP GUI TRAINING tab.
5. Click the training client number specified by your instructor. If you receive a copyright pop-up notice, click the green check to close the pop-up.
6. Stop when you have reached the Easy Access screen.

- ☒ It is important that you complete all of the exercises in their entirety because some subsequent exercises depend upon the data that you entered in previous exercises.
- ☒ In each of the exercises that follow, you will receive a delimit message on the infotypes because you are entering data on an existing employee. After you read and verify the warning message, press Enter on the keyboard to bypass it.

Instructor Demonstration #2.1 – Leave of Absence - STD 60-day waiting period

ZPAA076

Scenario

Diane Burger an Administrator at the Museum of Cape Fear has been approved for short-term disability effective today due to an illness. She is exhausting 40 hours of vacation leave during her 60-day waiting period.

Instructions

The instructor will use the scenario and steps in the Student's Exercise 2.1 to demonstrate.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Exercise #2.1 – Leave of Absence STD - 60-day waiting period

ZPAA076

Scenario


Diane Burger, an Administrator at the Museum of Cape Fear, has been approved for short term disability effective today due to an illness. She is exhausting 40 hours of vacation leave during her 60-day waiting period.

There are three parts to this Exercise:



- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.






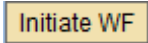

- Log onto SAP using the **Initiator** user id and password.
- On the Easy Access screen, type **ZPAA076** in the Command field.
- Click . The Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Personnel No.	Use the Data Sheet personnel number assigned to your student number.
Effective on	Today's date
Action Type	Leave of Absence
Reason	Short-Term Disability 60 day waiting period




- Click Enter .
- Click Create . The second screen of the Employee Action Request screen is displayed.
- Enter the following data:





Field	Value
Annual Salary	Same as current (hint: look in Current column)

NOTE: Observe there is a field that will not be used now, but will be used later when a Separation Action is processed: Last Date Worked.




8. Click Enter .
9. Click Save . The Information pop-up displays with the assigned PCR number.
10. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
11. Click  to close the pop-up.
12. Click Services for Object . **NOTE:** This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
13. Select Create > Create Note.
14. Enter a note title.
15. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action.
16. Click the green check  to close the notes. If applicable, close the notes icon menu.
17. Click . The Information pop-up displays indicating that the PCR has been submitted.
18. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).
19. To move from the Initiator role do one of the following :
 - Minimize the Initiator logon and keep on your desktop
 - Log off: Click the X in upper right, click Yes at the popup. Click the Log Off link on the portal screen, and Yes when asked if you are sure.

Part II – Approve PCR

1. Log onto SAP using the **Approver** user id and password.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox  to expand it.
4. Double click Workflow. The PCRs that have been sent to you for approval are listed in the right column.
5. Select the PCR you want to review.
6. In the bottom section of the screen scroll down and click the link for the PA PCRxxxxxxxxxx (PCR number) that you want to review. The PCR Employee Action Request screen is displayed.
7. Click Services for Object  to review any notes that were entered by the Initiator. **NOTE:** The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
8. Select Attachment List. The Service: Attachment list pop-up is displayed.


9. Highlight the line item for the note, and select Display . The Display note pop-up displays with the note title and note information.
10. Click  to close the Display note pop-up.
11. Close the Service: Attachment list pop-up. If necessary, close the Services for Object menu.
12. Click the back button  to return to the Workflow screen.
13. With the applicable PCR still highlighted, click Execute  (or double click the PCR line item).
14. Click Approve Change. Observe that you can also cancel the PCR and keep it in your files, or reject it and send it back to the Initiator.
15. Log off the Approver role.

Part III – Process Approved PCR as Initiator

1. Either log onto SAP using the **Initiator** user id and password or maximize from task bar.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox  to expand it.
4. Double click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
5. Select the PCR you want to process.
6. Click Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).

On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Today's date
Action Type	Leave of Absence


7. Click Enter .
8. Click Execute .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.

9. Complete the following fields:

Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF

10. Click  (Enter).

11. Click  (Save) to save the action.

12. At the Organizational Assignment infotype, complete the following fields:

Field	Value
Organizational Assignment	Contract field: SHP-STD < 5 Rtmnt

13. Click  (Enter). A delimit message is displayed.

14. Click  (Save).

Field	Value
Create Monitoring of Tasks	Task Type: From the drop down menu, select S/T Disability 60-day . Date: Enter a date that is the end of the 60 day waiting period Comments: Use Edit > Maintain text and enter the following note: Employee is expected to return from 60 day waiting period. Click Save to save the note.

15. Click  (Enter). If applicable, change the reminder date to an applicable date.


16. Click  (Save).

Field	Value
Delimit Objects on Loan	<p>In your work environment, follow your Agency's procedure. If your Agency does not require employees to return items, then you will select Next Record to skip the infotype.</p> <p>For this scenario, assume the employee returned the items on loan. Click the blank square beside the line item to select it.</p>

17. Click  (Delimit).

Field	Value
Create Substitutions	
From	The same date as the Action
To	12/31/9999
Subst.type	Select 08, STD (1st 6 mths after 89) from the drop-down menu
Work schedule rule	Enter D01N08GN

18. Click  (Enter).

19. Click  (Save). A pop-up box is displayed for Infotype Absences.

20. Select **9000 Approved Leave** for this scenario. If an employee is not using leave during the LOA, you merely click the X to close the Infotype Absences pop-up.

Field	Value
Create Absences	
Start	Use today's date (start of employee leave).
To	Use a date that totals the number of hours the employees wants to exhaust during the leave. In our exercise, the employee is using 40 hours.

21. Click Enter.

22. Click Save. The Collision pop-up box is displayed.

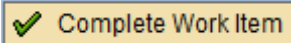
23. Click the red X.

24. Verify absence hours. Change the end date as applicable to total the correct number of leave hours that the employee wants to exhaust.

25. Click  (Save). The Collision pop-up box is displayed again.

26. Click the green check mark (if hours are correct).

27. At the Time Quota for Compensation pop-up box, click the X to skip the infotype. You are returned to the Personnel Actions screen.

28. Click the back button at the Personnel Actions screen. The system automatically returns you to Personnel Actions when you finish the last infotype within the Action.
29. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step.

Questions

Answer the following questions.

Question 1

When you place an employee on LOA STD 60 day waiting period, what date would you use on IT0019 Monitoring of Tasks and why?

A.

Question 2

Which Action and Reason would you use in this scenario? The employee went out on FMLA 80 days ago. You just now received the paperwork that verifies the employee is entitled to STD back to 80 days ago.

- a) LOA Action; STD Leave
- b) LOA Action: STD Extended
- c) LOA Action; STD 60 Day Waiting Period
- d) LOA Action: STD Regular
- e) No new Action is needed; the employee is already on LOA

A:

Question 3

True or False. An employee may have plenty of leave, but cannot exhaust leave while out on the 60 day waiting period.

A.

This exercise is complete.

Exercise #3.1- Leave of Absence STD - Regular

ZPAA076

Scenario


It has been 61 calendar days since Diane went on STD 60-day waiting period. She is not planning to use leave for her continued absence. A new LOA with the STD Regular needs to be created. When contacted, Diane indicated she thought she would be back within 12 months.

There are four parts to this Exercise:



- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR
- IV PA30

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.





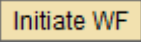

- If necessary, log onto SAP using the **Initiator** user id and password or maximize from task bar.
- On the Easy Access screen, type **ZPAA076** in the Command field.
- Click . The Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Personnel No.	Use the Data Sheet personnel number assigned to your student number—same employee as previous exercise.
Effective on	61 days after the first LOA in the previous exercise
Action Type	Leave of Absence
Reason	Short-Term Disability Regular

- Click Enter .
- Click Create . The second screen of the Employee Action Request screen is displayed.
- Enter the following data:

Field	Value
Annual Salary	Same as current




- Click Enter .

9. Click Save . The Information pop-up displays with the assigned PCR number.
10. Write the PCR number on your new hire paperwork (in class, use your Exercise Guide).
11. Click  to close the pop-up.
12. Click Services for Object . **NOTE:** This button is not available until you have saved the Employee Action Request. The Services for Object button displays either an icon menu or a drop down menu depending upon whether you click on the right or left of the icon.
13. Select Create > Create Note.
14. Enter a note title.
15. Click in the note section and write the applicable information to send along with the PCR. Begin the note with your name and the date. **NOTE:** The notes that you write are only recorded in the Workflow PCR; they do not follow in the PA Action.
16. Click the green check  to close the notes. If applicable, close the notes icon menu.
17. Click . The Information pop-up displays indicating that the PCR has been submitted.
18. Click the green check  to close the Information pop-up. You are returned to the Employee Action Request (first screen).

Part II – Approve PCR – Instructor or Navigator

- Only the Agency approver is required for a LOA.

Part III – Process Approved PCR as the Initiator



1. If necessary, log onto SAP using the **Initiator** user id and password or maximize from task bar.
2. From the Easy Access screen, click SAP Business Workplace .
3. Click the node beside Inbox  **Inbox** to expand it.
4. Double click Workflow. The PCRs that have been approved (or rejected) are listed in the right column.
5. Select the PCR you want to process.
6. Click Execute  (or double click the PCR line item). BEACON SAP automatically takes you to the applicable screen for the Action (in this exercise, it is the Personnel Actions screen).
7. On the Personnel Actions screen, enter:

Infotype/Field	Value
From	Use the same date that you used on Workflow
Action Type	Leave of Absence



8. Click Enter .
9. Click Execute .

NOTE: It is a best practice to always save a pre-populated infotype even if you do not make changes. In some cases, there are dynamic infotypes that display only when the previous infotype was saved. If you use the Next record button instead of saving, those dynamic infotypes will not display and the employee's record will be incomplete.




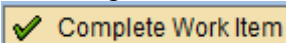
Infotype/Field	Value
Actions (0000)	
Reason for Action	Observe the field defaulted from WF

10. Click  (Enter).
11. Click  (Save) to save the action.

Field	Value
Organizational Assignment	Contract field: SHP-STD < 5 Rtmnt

12. Click  (Enter). A delimit message is displayed.
13. Click  (Save).

Field	Value
Task Type	Select estimated return date
Date of Task	<p>30 days. It is a best practice to follow-up on employees who are out on leave every 30 days.</p> <p>Comments: Use Edit > Maintain text to write the following comment:</p> <p>Check status of employee. Employee originally expected to be out for 12 months.</p>

14. Click  (Enter). If applicable, change the reminder date to an applicable date.
15. Click  (Save).
16. At the Change Substitutions infotype, click  (Save)—the data should have populated from the original LOA Action.
17. At the Absences pop-up window, click X to close as the employee is not exhausting leave during this LOA.
18. At the Time Quota Compensation pop-up, click X to close as there is no pay-out on this LOA. You are returned to the Personnel Actions screen.
19. Click the back button at the Personnel Actions screen. The system automatically returns you to Personnel Actions when you finish the last infotype within the Action.
20. The pop-up displays indicating that the item must be explicitly completed. Click Complete Work Item . **NOTE:** It is critical that you complete this last step.

Part IV – PA30

Create a PA30 on IT0019 (Monitoring of Tasks) to remind you to put the employee on a new substitution (IT2003) after the first six months have passed.

1. Enter PA30 in the Command field and press Enter.
2. Enter 0019 in the Infotype field.
3. Enter 25 in the subtype field.
4. Press Enter.
5. Click the Create button.
6. Date of task: <enter a date that is the end of the 1st six months of LOA).
7. Click Edit > Maintain Text.
8. Begin the note with your name and date, and then enter: Ends 1st 6 months; enter a new 2003 for 2nd 6 months if employee has not returned.
9. Save. The Create Text Monitoring of Tasks screen is displayed.

10. Save. The Maintain HR Master Data screen is displayed.

Questions

Answer the following questions.

Question 1

Which Action and Reason is applicable if the employee is still out on STD leave after the 60 day waiting period, but has no leave to use while out?

- a) LOA Action; STD (Leave)
- b) LOA Action: STD Extended
- c) LOA Action: STD Regular

A:.

Question 2

What responsibility does the Agency have if the employee is out longer than 6 months on Regular or Leave and goes on long-term disability? Where would the Agency get the information to handle that responsibility?

A:

Question 3

Which Action and Reason is applicable if the employee is still out on STD leave after the Regular leave has expired

- a) LOA Action; STD (Leave)
- b) LOA Action: STD Extended
- c) LOA Action: STD Regular

A:

This exercise is complete.

Exercise #3.2 – Change Infotype 2003

PA30


Scenario

Six months have passed and you ran the Date Monitoring report for the week. The report indicates that Diane Burger is entering her second six months of LOA. You have verified that Diane has not returned to work. Revise Diane's record to indicate that she is now in the second 6 months. Since this is a PA30 transaction, it is not initiated via Workflow.


NOTE: If an employee is out on LOA for longer than 6 months, you must modify the IT2003.

Instructions




Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Enter transaction code **PA30** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel No.	Use the personnel number from your data sheet—same employee as you used in previous exercise.
Infotype	2003 Substitutions

3. Click  (Change).
4. Complete the following fields:

Field	Value
To	Change end date to last day of first six months.

5. Click  (Enter).
6. Click  (Save).
7. If a Collision of Time appears, click the green check to by-pass it. If the Collision contains a red stop, you will have to resolve the time issues before you can continue.
8. Click  (Copy).
9. Complete the following fields:

Field	Value
From	The beginning date of the second six months.
To	12/31/9999
Subst type	09

10. Click  (Enter).

11. Click the green check to by-pass the Collision of Time if necessary.

12. Click  (Save).

To verify that both the 1st 6 months and 2nd 6 months are attached to the employee's record, select the "All" time period and either use the Overview or Display icon to review.

Question

Answer the following question.

Question 1

Why is it important to have a Monitoring of Task IT0019 to remind you to change the employee's Substitution infotype to the 2nd 6 months?

A.

This exercise is complete.

Exercise #5.1 – 2010 Process- Employee Remuneration


PA30

Scenario


Diane's Form 703 has been approved and signed by the Doctor. Enter the wage type and amount so that Diane can receive her STD payment. Since this is a PA30 transaction, it is not initiated via Workflow.

NOTE: Each time a 703 is signed by the doctor and returned to the STD Specialist, an IT2010 is created.

Instructions

1. Enter transaction code **PA30** in the Command field and click .
2. Complete the following fields:

Field	Value
Infotype	2010

3. Click  (Enter).
4. Click Create.
5. Complete the following fields:

Field	Value
Date	The first of next month for this exercise (in your work environment, use the date that the doctor actually signed Form 703)
Wage Type	From the drop-down menu, select 1332 (STD 1st 6 months) . It is important to remember that the Wage Type you choose is determined by the years of service the employee has as of 8/12/1989. The code you select determines if the employee's benefits are subject to State taxes or not.
Amount	\$1813.00 (Reflects amount calculated from Forms 714 and 711)

6. Click  (Enter).
7. Click  (Save).

Questions

Answer the following questions.

Question 1

In addition to whether or not you are entering remuneration for the 1st or 2nd 6 months, what other factor must you consider when choosing the Wage Type?

A.

Question 2

True or False: Benefits are subject to State tax for employees who have more than 5 years of service as of 8/12/1989.

A. This exercise is complete.

Exercise #6.1 – Separation Pay Continuation- STD

ZPAA076

Scenario

Gilbert Catalano works in an Agency that allows employees to be separated with pay for a specified period of time instead of going on leave for short-term disability. Gilbert will be allowed to continue pay for 6 months, at which time a decision will be made concerning his situation.

Process the Separation Pay Continuation for Gilbert with a reminder to cancel the pay at the end of 6 months.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Using information that you learned in previous exercises, log on as the Initiator and initiate Workflow using the applicable data:
 - Date: Today's date
 - Action Type: Separation Pay Continuation
 - Reason for Action: Separation Short Term Disability
 - Don't forget to enter the date in the "Last Day Worked field" of the second screen on Workflow

Part II - Approve PCR – Instructor or Navigator

- Both the Agency and Funding approver roles are required for this exercise.

Part III - Process Approved PCR as Initiator

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: same as you used for the Workflow
 - Action: Separation Pay Continuation
 - Copy Actions: Change the Position field to: 99999999. You only change the position number to 9s when processing Separation Pay Continuation. You change to 9s on the Actions infotype and not on Workflow. On a regular Separation, BEACON SAP changes the position number to 9s automatically.
 - Organizational assignment: Click Yes to create a vacancy on the position.
 - Copy Date Specifications: Save after you verify the last day worked is correct.
 - Cost Distribution: Save
 - Infotypes for Time Quota Compensation pop-up, select: Vacation Payout.
 - Infotype 0416: **Change the date to the effective date of the Action. This is the only infotype on which you change the date.**
 - In the No. to Compensate field, enter the same number of hours that are showing in the Rem. Column.
 - Delimit items on loan.
 - When you are returned to the Personnel Actions screen, click the back button and explicitly complete the Workflow item.

Questions

Answer the following questions.

Question 1

Why is it important that you create a Monitoring of Task 0019 when you process a Separation Pay Continuation?

A.

Question 2

What step must you manually perform on the Actions infotype when processing a Separation Pay Separation?

A. Question 3

In reference to the answer to #2 above, is it necessary that you perform the same step when you process a Separation? Why or Why not?

A.

This exercise is complete.

Exercise #6.2 – Separation

ZPAA076

Scenario

It is now 6 months from the previous exercise. When you ran the Date Monitoring report, a reminder about Gilbert Catalano displayed indicating that his 6 months of pay continuation is ending today.

Create a Separation Action with the applicable reason to end the pay continuation for Gilbert.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: 6 months from the previous exercise
 - Action Type: Separation
 - Reason for Action: Cancel Separation Pay Continuation
 - Don't forget to enter the date in the "Last Day Worked field" of the second screen on Workflow (enter the same date as was used on the Separation Pay Continuation Action).

Part II - Approve PCR – Instructor or Navigator

- Both the Agency and Funding approver roles are required for this exercise.

Part III - Process Approved PCR as Initiator

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: same as you used for the Workflow
 - Action: Separation
 - Date Specifications: Delete the last day worked in the lower right corner. The last day worked was when the employee was separated with pay continuation, which is already populated in the last day worked field in the upper left.
 - When you are returned to the Personnel Actions screen, click the back button and explicitly complete the Workflow item.

Questions

Answer the following questions.

Question 1

What would be the result if you did not process a Separation for the employee?

A.

This exercise is complete.

Exercise #7.1 – Reinstatement

ZPAA076

Scenario

Assume it is now 9 months since Diane Burger went out on leave. If you remember from previous exercises, Diane was first on LOA – STD 60 Day Waiting Period, and then she went out on LOA – STD Regular (because she was not exhausting leave while out).

Diane has fully recovered and is returning to work.

NOTE: The training system will not allow you to use a date 9 months in the future; therefore, you are going to use a date to simulate 9 months in the future.

There are three parts to this Exercise:

- I Initiate Workflow (WF)
- II Approve PCR
- III Process Approved PCR

Instructions Part I – Initiate Workflow (WF)

Access the Business Process Procedure (BPP) from Help > BEACON Help.

1. Using information that you learned in previous exercises, initiate Workflow using the applicable data:
 - Date: Choose a date that is the 1st of the month following the date of Diane's last LOA (in Exercise 3.1).
 - Action Type: Reinstatement
 - Reason for Action: Return from STD Complete

Instructions Part II - Approve PCR

Your instructor will let you know if you have to perform the Approver steps.

Instructions Part III - Process Approved PCR as Initiator

1. Using information that you learned in previous exercises, enter data on infotypes as applicable:
 - Date: same as you used for the Workflow
 - Action: Reinstatement
 - Delimit substitutions: Delimit
 - When you are returned to the Personnel Actions screen, click the back button and explicitly complete the Workflow item.

Questions

Answer the following questions.

Question 1

Since you got approval via Workflow to place an employee on LOA, is it necessary to submit Workflow to bring the employee back to work from LOA? Why or Why not?

A.
